INsite v. 3.7b Release Notes (CA-PRTF version)

June 26, 2009

Please note the CA-PRTF Training Guide (www.roeing.com/software/insite/dmha/training_guide.pdf) has been updated to include these changes. See pages 28 & 29.

The following changes are implemented in this version:

View State Wide Wait List

- ***NOTE*** about putting someone on the waiting list: when you complete a DEW to put someone on the waiting list, the client and their family need to be informed and given appeal rights. You can print the documents by clicking the Printer button on the Data Entry Worksheet. The first form is the DEW which it is not necessary to print. The following document is the Appeal Rights form. It automatically prints 3 copies – one for the client/client's family, one for the WrapAround Facilitator and one to be sent to FSSA in the event of an appeal.
- When you have exported a DEW to place a client on the CA-PRTF wait list and it is received at the State, they will send back the State Wide Wait List data via the FTP Send/Receive process.
- You can view where your clients stand on the wait list by following these steps.
- DMHA >> CA-PRTF Position on Waiting List
- Or you can print the Statewide waiting list so that you can see the wait list position for all of your agency's clients by clicking on DMHA >> Print State Wide Waiting List
    - When you print the State Wide waiting list, it will print **** to denote clients from another agency.

Targeted Hot List

- When slots become available, the State will 'target' clients from the wait list to fill the available slots. Your agency will be notified via email when your clients are targeted. The email will be sent to your agency's representative. If you receive the email, pass it along to the WrapAround Facilitators who have had clients targeted.   The WrapAround Facilitator will need to promptly respond with one of two actions:
    - Prepare and submit an Initial CCB

        ---OR---

- Prepare and submit a Date Entry Worksheet (DEW) to remove the client from the wait list. See Hot List Display section below for further instructions on completing this type of DEW.

- If neither of these actions has taken place within 15 days of the the client being targeted, your agency will receive an email notification reminding you to take an action. If there is still no action taken after 21 days, the State system will automatically create a DEW to remove the person from the wait list.

- The list of targeted clients will get imported into your system the business day following the day they were targeted.
- This happens via the FTP Send& Receive Process.
- Once imported, the Targeted Hot List can be viewed from the Local Hot Lists menu.

  - Click the Local Hot Lists menu button and then click Clients Targeted by DMHA .
  - Select the Target Date for which you want to see the list by clicking on the folder.

- Hot List Display

  - Click the DEW button to create a Denial DEW to remove the client from the waiting list. This is a shortcut to creating a DEW instead of completing it in Client Processing. This also a trimmed-down version of the DEW with fewer items to fill in.
    - When the DEW screen comes up, choose these values:
      - CA-PRTF
      - Select the reason code that best fits the situation.
      - Fill in the Effective Date
      - Enter an explanation of action
      - Print the Appeal paperwork to notify the client/client's family that they have been removed from the waiting list. You can print the

documents by clicking the Printer button on the Data Entry Worksheet. The first form is the DEW which it is not necessary to print. The following document is the Appeal Rights form. It automatically prints 3 copies – one for the client/client's family, one for the WrapAround Facilitator and one to be sent to FSSA in the event of an appeal.

- When a DEW has been completed, the 'Off-New DEW' column will say 'YES' and have a red background.
- When a CCB has been prepared and submitted, the CCB column will say 'YES' with a Green background. To prepare a CCB, you will need to bring up the client in Client Processing and complete the Initial CCB.

Pick List Change

- The default Provider type will be 'All Providers' instead of companies only.

MDS Report Change

- On the MDS report, when you put in a number as an answer, it will need to be a whole number. The decimal point has been removed to make data entry easier, so if you need to enter a fractional value, you will need to round it to a whole number.